SAePS Vendor Training



Background

- □ 2004 2007 E-Procurement Product Demonstrations
- 2007 2008 Request Identified requirement for Project Management group for e-procurement and Project Management put in place
- □ 2008 NIGP study recommended an e-procurement system and centralized process
- □ 2009 RFI for E-Procurement
- □ 2010 Project Start



Why SAePS?

□ Improve Efficiencies

□ Enhance Transparency

□ Ensure Consistency & Compliance



Vendor Benefits

- □ User friendly dashboard for vendors
- Self administration to manage user access and information
- □ Email notification of solicitations relevant to vendor
- □ Electronic vendor response including modification, withdrawal of bids, versioning of bids and confirmation of bidder's participation
- □ Electronic catalogs—eliminates high-maintenance paper catalogs
- ☐ Increased data accuracy and visibility of invoice process for vendors and COSA
- □ Improved requisition-to-order cycle time



Prime and Subcontractors

Vendors/Suppliers wishing to take advantage of the features and benefits of the City of San Antonio procurement tool are required to complete the electronic registration process

- You are considered a "Procurement Supplier" if one of the following conditions exists:
 - Your company will receive payments from the City of San Antonio under a contract or purchase order
 - Your company will receive Request for Quotations, Purchase Orders, or other Procurement documents
 - Your company is a construction contractor



What do I need to get started?

□ Internet Access

If you do not have Internet Access at your place of business, you can access the Internet at a Public Library (note: There will be no one to assits with vendor registration, please call vendor support (210-207-0118)

Adobe Reader

■ If you do not have Adobe Reader, you can download a free copy from the City of San Antonio website

□ Email address

■ If you do not have an email address you can create a free account using Yahoo, Gmail, Hotmail

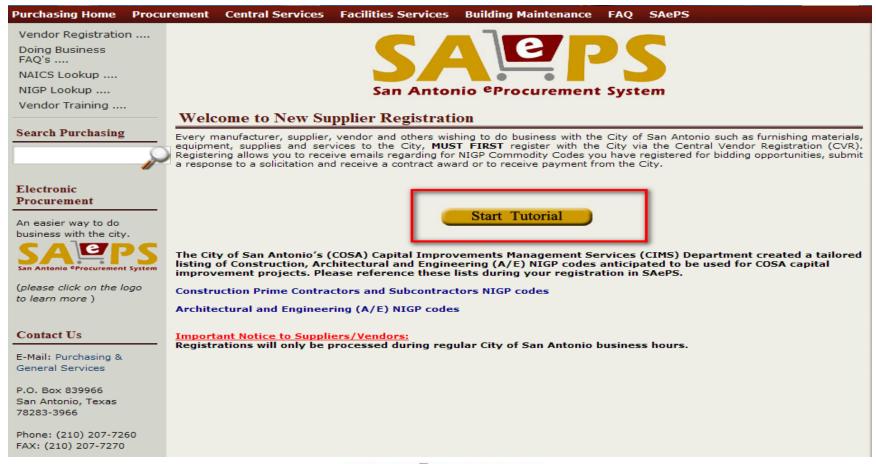


To begin the registration process go to:

http://www.sanantonio.gov/Purchasing/saeps.aspx

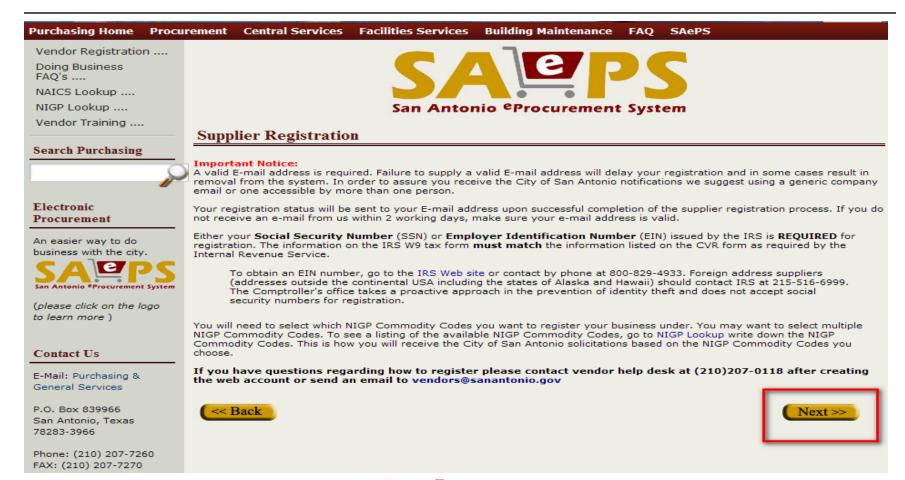


Supplier Registration Tutorial 1 of 8





Supplier Registration Tutorial 2 of 8





Supplier Registration Tutorial 3 of 8

Pre-Registration









Step 1 of 4

- Enter data for all * required fields
 - O Legal Name of Company as listed with the IRS
 - E-mail address: This email address will be used for the initial part of the vendor registration.
 This email is not the email you will be receiving bid solicitations. Please refer to Step 3 for more information
 - O Telephone Number
 - Fax Number
 - O House Number (your business street number)
 - O Street Name (your business street name)
 - O City, State and Postal Code
 - O Select your Country from the drop down list
 - O All other fields are optional
- After reading Privacy Statement click the checkbox "I certify that the information that I am supplying is true and correct and that it is my obligation to notify City of San Antonio if any information changes"
- Click Submit
- Upon submission, the next screen will be an acknowledgement that verifies your information has been submitted successfully. You will have completed the first step in becoming a supplier/vendor and you may close your browser







Supplier Registration Tutorial 4 of 8

City of San Antonio Questionnaire









Step 2 of 4

The second step to becoming a registered supplier/vendor is:

- You will receive a Questionnaire at the email provided during pre-registration (Step 1)
- Please click on the embedded link listed on the email. You may also copy and paste the link directly to your browser
- You must complete all required fields to proceed
 - Legal Company Name: shown on your IRS tax form
 - O Federal Tax ID: This is either your Employer Identification Number (EIN) or Social Security Number (SSN). You will only be allowed to enter one. Note: Your Employer ID Number (EIN) is your tax ID issued by the IRS. If you do not know your Employer ID, please contact your company's business office or the IRS directly. The City of San Antonio cannot provide it to you.
 - O Select the "TYPE" of Tax ID Number you provided (i.e. EIN xx-xxxxxx or SSN xxx-xx-xxxx)
- Remittance Address & Remittance Contact" The fields are optional; however, if you would like your payment mailed to a different address form your initial registration, please provide this information

Note: An email will be sent notifying you of approval or rejection (rejection may be due to your information already being in our system). Please allow up to 24-48 hours for a response. Suppliers/Vendors will only be created during business hours.







Supplier Registration Tutorial 5 of 8

Create Administrative User









Step 3 of 4

Following the submission of your company's intitial registration, you are ready to begin Step 3 of the registration process. Below are the steps required to setup your Administrative User Account. The Administrative User maintains your company profile (i.e. product category data, contact information).

- To begin Step 3 of the Supplier/Vendor registration process City of San Antonio will send you two emails
 - First email contains a one time temporary user name also included will be a link
 - Second email contains a one time temporary password
 - O Please select the link included in the first email or cut and paste the link into your browser. Please then enter the temporary user name and password
 - <u>Important</u>: You will only have 15 minutes to create your administration profile before the system times you out. If the system times out prior to completing your information, please contact SAP Vendor Support at 210-207-0118 or by email at vendors@sanantonio.gov
- You must complete all required fields
 - Your user name will be pre-populated
 - <u>Important:</u> Print this screen as it contains your permanent User Name (i.e. Vxxxxxxxx). This will be required to logon the SAePS Portal
 - O Create a password; however, this is a temporary password which is case sensitive. The password must be a minimum of 8 characters in length (containing 3 letters, 2 numbers, 1 uppercase letter and 1 lowercase letter). Upon logging on to the SAePS portal, you will enter this password
 - Select the FormofAddr.
 - O Enter First Name
 - O Enter Last Name
 - Enter E-mail Address In order to assure you receive the City of San Antonio bid solicitation notifications and correspondence we suggest using a generic company email or one



Supplier Registration Tutorial 6 of 8

- O Select your Country
- O Enter your telephone number
- O Enter your fax number
- O The last three fields can be left as the default (changing these fields is optional).
- After reading the privacy select the checkbox
- O Select the Create button to finish the process of creating your SAePS Administrative user. The SAePS Portal screen will be displayed. Please enter your user id (i.e. Vxxxxxxxx) and the password you created and click log on. You will be prompted to create a new password







Supplier Registration Tutorial 7 of 8

Supplier Portal Logon









Step 4 of 4

- You are now logged onto the portal, please finalize your profile
 - O Under the home tab vendor can setup a security question and password. <u>Important:</u> The security question must be created, as it will be required in the event you have forgotten your password, you will have the ability to click on the "Get Support" on the portal to reset the password
 - Click on Portal Personalization
 - Click on User Profile
 - Click on Modify above the General Information tab
 - Type in a security question (i.e. what's my cat's name?)
 - Answer your security answer (i.e. Garfield)
 - Under the same you will be able to make changes to the Administrative contact information
- Vendor Information tab
 - You will be required to update questions pertaining to Small Business Economic Development Advocacy (SBEDA)
 - Questions 1 13 are pre-populated. Information is gathered from the initial registration
 - Question 14-18 and 32a 32j are pre-populated. Information is verified by the South Central Texas Regional Certification Agency (SCTRCA). If you are not registered with SCTRCA, the fields will remain blank
 - Please answer the remaining questions
 - Click Save



Supplier Registration Tutorial 8 of 8

- Spend Categories tab <u>Important:</u> The NIGP Commodity Codes you select will determine the solicitation notices
 your company will receive via e-mail. You may add or delete commodities within your profile as frequently as you
 desire. View NIGP Lookup
 - O Click on Spend Categories under the detail navigation on the left hand side
 - O You will see Spend Categories Registered
 - O Click on the Add button
 - Select the NIGP Commodity Codes closest to the actual product or service, which you can provide.
 Note: There is no limit on the amount of commodities you may select.
- Overview tab
 - O Under this tab you will have the ability to view bid solicitations based on the commodities you selected. Note: If a solicitation has opened prior to your registration and commodity updates, you must contact the buyer listed on the solicitation to be added to the list
- SRM User Settings
 - O SRM User Settings will allow for you to update and maintain your profile
 - Click on Home tab
 - Click on SRM User Settings link on the main page
 - Click on Edit to change your Contact Person Data or Contact Data. Important: When making changes to this section will reflect on how you receive your bid solicitations. The email address under the Contact Data tab is the email address used for bid solicitations
 - Click Save







Step 1: Vendor Pre-Registration Form 1 of 3

Required Entry Company Details	
Name of Company *	
D-U-N-S Number Language * English	
Address Data	
E-Mail Address * Telephone * Fax * House Number *	Extension Extension Street *
Building Floor	Room Number
Postal Code * State	City * Country * Please choose
P.O. Box PO Box City and State	PO Box Postal Code Please choose



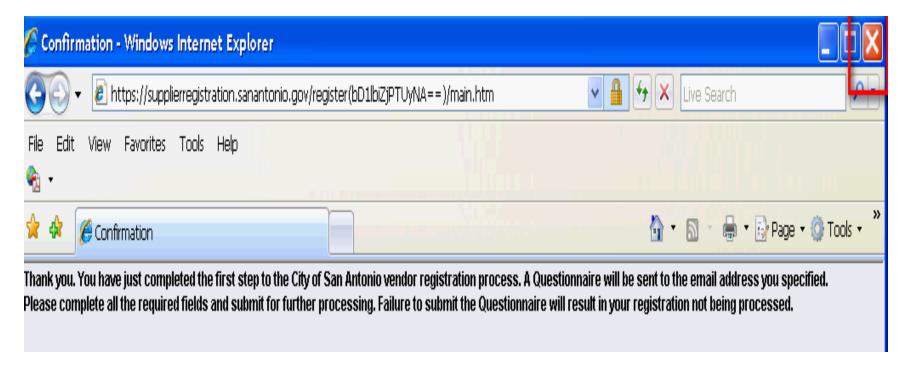
Step 1: Vendor Pre-Registration Form 2 of 3

Data Privacy Statement Lunderstand that Lam receiving a vendor registration number from the City of San Antonio. This number allows the City of San Antonio to recognize me or my company in their financial software system. This number does not mean that I am an awarded vendor. To become an awarded vendor I must comply with all the City of San Antonio policies. regarding such. I further understand that my vendor registration number can be revoked at anytime if I do not follow all applicable City of San Antonio policies, related procedures. and all applicable federal and State laws. I further understand that it is my responsibility to have knowledge of all applicable federal and State laws and any changes that may occur. 🔲 I certify that the information that I am supplying is true and correct and that it is my obligation to notify City of San Antonio if any information changes. Delete Entries



Step 1: Vendor Pre-Registration Form 3 of 3

Upon submission of your pre-registration, you will receive the following message. You may close your browser at this time.





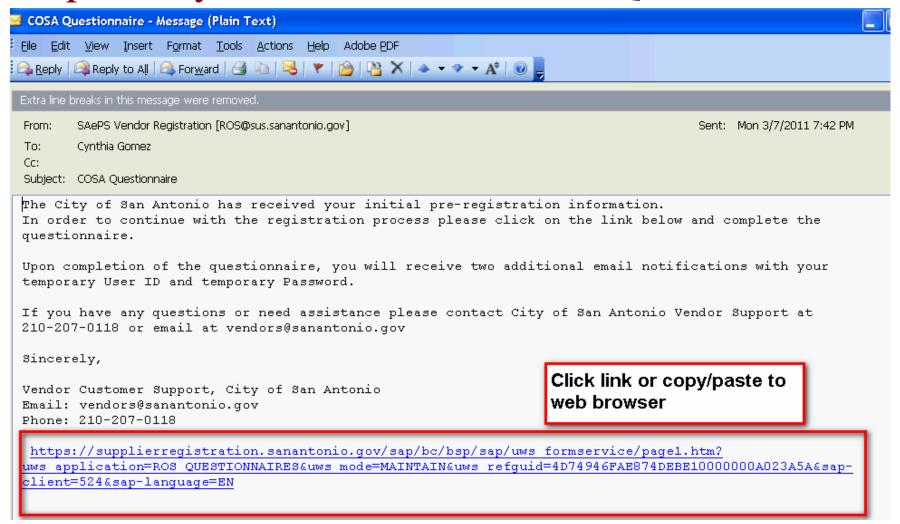
Important:

At time of submission, there is approximately 15 minute delay to receive the City of San Antonio Questionnaire (Step 2). If you do not receive an email within the hour of submitting Step 1, please contact the Vendor Support line at 210-207-0118 or email

vendors@sanantonio.gov



Step 2: City of San Antonio Email Questionnaire

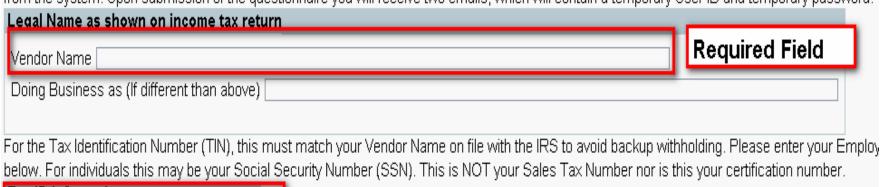




Step 2: City of San Antonio Questionnaire 1 of 2

COSA Questionnaire

Please complete all required fields, verify all entries and submit the questionnaire. Failure to provide the information below will delay your registration at from the system. Upon submission of the questionnaire you will receive two emails, which will contain a temporary User ID and temporary password.



Tax ID Information	٦
Federal Tax ID	Required Field
Type Please select EIN or SSN	



Step 2: City of San Antonio Questionnaire 2 of 2

The following fields are optional; however, if you would like your payment mailed to a different address form your initial registration, please provide this information

Remittance
Remittance Address
c/o:
Address:
City:
State:
Zip Code:
Country:
Remittance Contact
Contact Person:
Phone:
Fax:
Mobile:
Email Address:
Web address:

Please click on Send Questionnaire and close (x) your browser. (Please click on Send once, this page will not display further instructions or a successful Send Questionnaire.



Important:

An email will be sent notifying you of approval or rejection (rejection may be due to your information already being in our system). Please allow up to 48 hours for a response.

Suppliers/Vendors will only be created during business hours.



Step 3: Email Notification User Name

From: SAePS Vendor Registration [ROS@sus.sanantonio.gov] Sent: Mon 3/7/2011 8:10 PM Cynthia Gomez To: Cc: Subject: Cyndy Test Print Screens Dear Sir/Madam, We are pleased to welcome Cyndy Test Print Screens as a potential Vendor in the City of San Antonio Vendor Portal. The temporary User ID 0B9C5214481 has been created for you. Please note: this is only a one time User ID. Fiease log on to https://supplierregistration.sanantonio.gov/login as soon as possible using this temporary User ID. The system will generate a user ID, which will be your permanent User Name. This User Name will enable you to participate in relevant Solicitations, update NIGP Commodity Codes, respond to additional City of San Antonio questions, and will allow you to create security questions for password resets. After creating and submitting your Administration User, please use the system generated User Name and the password you created to access the City of San Antonio Vendor Portal by accessing the following link. It is recommended that you create a Favorite/Bookmark for this web address for future use. https://selfservice.sanantonio.gov. Sincerely, Vendor Customer Support, City of San Antonio Email: vendors@sanantonio.gov Phone: 210-2070118



Step 3: Email Notification Password

From: SAePS Vendor Registration [ROS@sus.sanantonio.gov]

Sent: Mon 3/7/2011 8:10 PM

To: Cynthia Gomez

Cc:

Subject: Cyndy Test Print Screens

Below is your single use temporary password. You will be prompted to create a new password. Please note you will only have 15 minutes to complete your administration profile before the system times out. Should you time out please contact 210-207-0118 for assistance.

Your temporary password for registration is

pF375qC9

Thank You

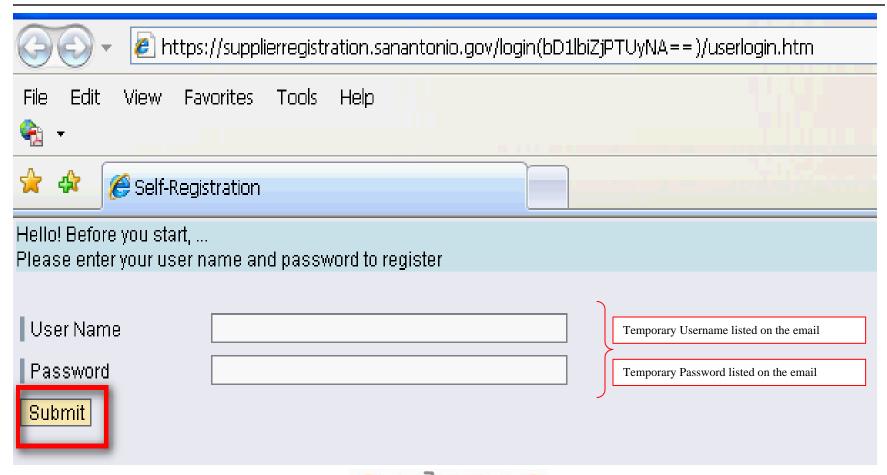
Vendor Customer Support, City of San Antonio

Email: vendors@sanantonio.gov

Phone: 210-207-0118



Step 3: Create Administrative User 1 of 2





Important: Print this screen as it contains your permanent User Name (i.e. Vxxxxxxxx). This will be required to logon the SAePS Portal

Hello! Before you start,	
	administrator for your company with the following registration
Fields indicated with a * r	at your company has been registered with us must be filled
Theras marcated with a	
*User Name	V10000387
*Password	Password must be a minimum of 8 characters in length
*Confirm Password	(containing 3 letters, 2 numbers, 1 uppercase letter and 1 lowercase letter)
*FormOfAddr	Selec▼
*First Name	
*Last Name	
*E-Mail Address	In order to ensure you receive the City of San Antonio bid solicitation notifications and correspondence we suggest using a generic company email or one accessible by more
*Country	Afghanistan than one person
Language	English ▼
Telephone	
Fax	
Company Department	
Date Format	MM/DD/YYYY ▼
Decimal Format	12,345,687.90 🕶
Time Zone	Central Time (Dallas)



Step 3: Create Administrative User 1 of 2

Lunderstand that I am receiving a permanent SAePS User Name from the City of San Antonio to access the City's SAePS Portal. This account will enable my business to participate it Solicitations posted by the City of San Antonio. I further understand that it is my responsibility to maintain my user profile, and access can be revoked at any time if I do not follow applicable City of San Antonio Policies, related procedures, and all applicable federal and state laws.



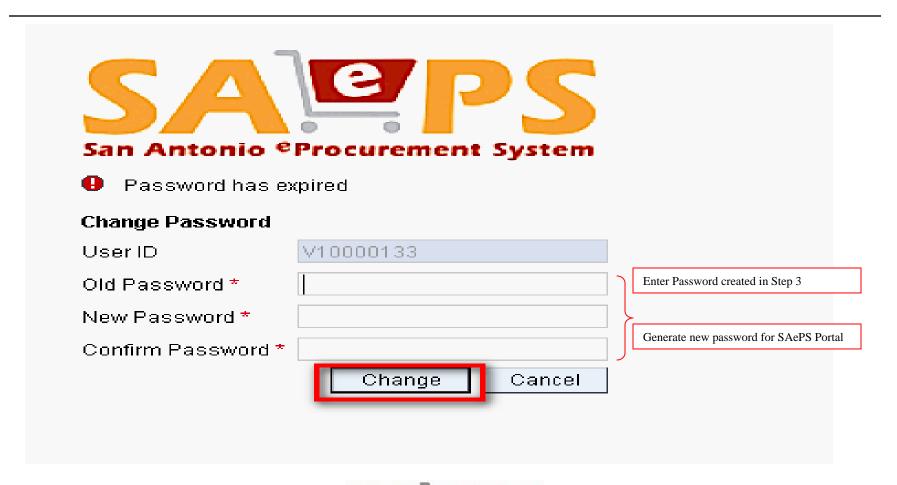


Step 4: Supplier Portal Logon



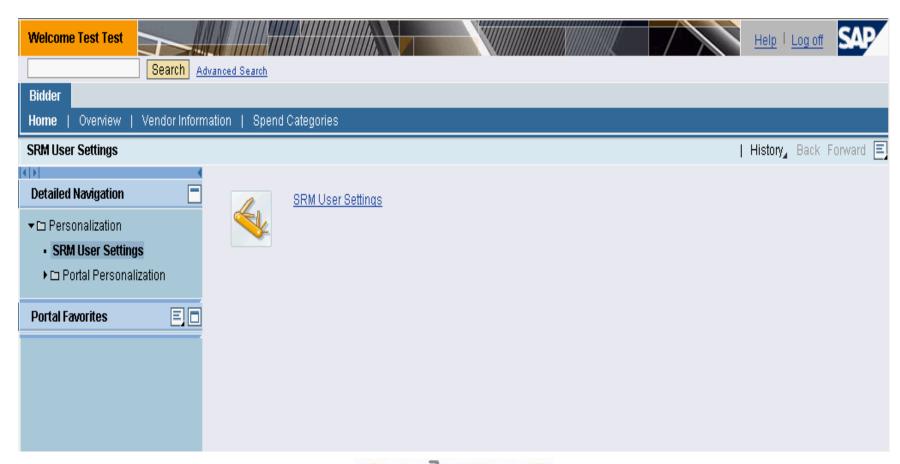


Step 4: Supplier Portal Logon Password Change



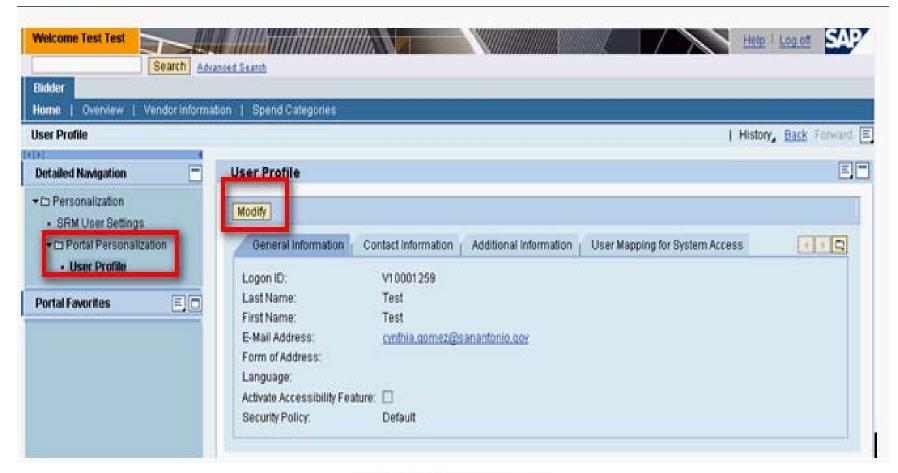


Step 4: Supplier Portal Logon Home Page





Step 4: SRM User Profile Security Question





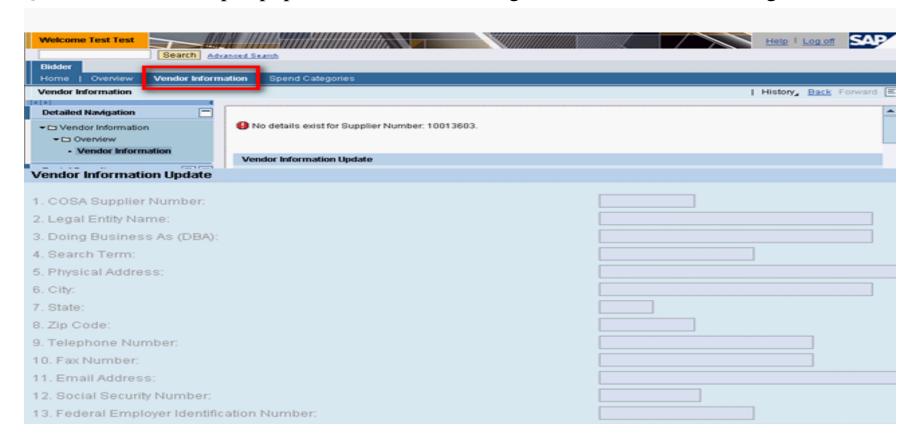
Important: The security question must be created, as it will be required in the event you have forgotten your password, you will have the ability to click on the "Get Support" on the portal to reset the password

Welcome Test Test Search Bidder Home Overview Vendor Info	Advanced Seasoh			Help	Logoff S
User Profile	mator Spend Categories			History	Back Forwa
Detailed Navigation	User Profile				
Personalization SRM User Settings Portal Personalization User Profile Portal Favorites	Logon ID: * [V10001		I Information User Mapping f	or System Access	*PQ
	Security Question: * Security Answer: *	What's my cats name	Password must be a minimu (containing 3 letters, 2 numl lowercase letter)		
	Last Name: * First Name: E-Mail Address: Form of Address: Language: Activate Accessibility Feature	Test Test cynthia.gomez@sanant			



Step 4: Small Business Economic Development Advocacy (SBEDA) Questionnaire 1 of 6

Questions 1-13 are pre-populated. Information is gathered from the initial registration





Step 4: Small Business Economic Development Advocacy (SBEDA) Questionnaire 2 of 6

Question 14-18 and 32a – 32j are pre-populated. Information is verified by the South Central Texas Regional Certification Agency (SCTRCA). If you are not registered with SCTRCA, the fields will remain blank

	_	-	
14. RCA Certification Type:			
15. RCA Certification Number:			
16. RCA Certification Date:			
17. RCA Certification Expiration Date:			
18. Date Last updated from RCA:			
32a. Small Business Enterprise (SBE)::			
32b. Asian Business Enterprise (ABE):			
32c. African American Business Enterprise (AABE):			
32d. Hispanic American Business Enterprise (HABE):			
32e. Native American Business Enterprise (NABE):			
32f. Women Business Enterprise (WBE):			
32g. Disadvantage Business Enterprise (DBE):			
32h. Emerging SBE (ESBE):			
32i. Minority Business Enterprise (MBE) and:			
32j. Airport Concessionaire Disadvantaged Business Enterprise (ACDBE):			



Step 4: Small Business Economic Development Advocacy (SBEDA) Questionnaire 3 of 6

Please answer the remaining questions

19. Texas Comptrollers Taxpayer Number (TIN or TID), If applicable:		
20. Business Structure:		
20a. Individual/Sole Proprietorship:	O No	○Yes
20b. If '20a' is yes, list Assumed Name, if any:		
20c. Assumed Name 1:		
20.d Assumed Name 2:		
20.e Assumed Name 3:		
20.f Assumed Name 4:		
20.g Assumed Name 5:		
20h. Partnership:	○ No	○ Yes
20i. Corporation:	○ No	○Yes
20j. If '20i' is yes, select one: For-Profit, Nonprofit:		
20k. If '20i' is yes, select one: Domestic, Foreign:		
20I. Other:	O No	○ Yes
20m. If '20l' is yes, list business structure:		
21. Ownership: Does Respondent anticipate any mergers, transfer or organization:		
ownership, management reorganization, or organization ownership, management:		
reorganization, or departure of key personnel within the next 12 months?:	○ No	O Yes
22. Are you authorized and/or licensed to do business in Texas?:	O No	○Yes
If "YES" list authorizations / licenses: provide list		
22a. List 1:		
22b. List 2:		
22c. List 3:		
22d. List 4:		
22e. List 5:		



Step 4: Small Business Economic Development Advocacy (SBEDA) Questionnaire 4 of 6

Please answer the remaining questions 23. List any other names under which Vendor has operated within the last 10 years. 23a. Name 1: 23b. Name 2: 23c. Name 3: 23d. Name 4: 23e. Name 5: 23f. Name 6: 23g. Name 7: 23h. Name 8: 23i. Name 9: 23j. Name 10: Vendor's Legal Contract Signatory Title: * 24a. Date: Last updated by supplier: 25. Individual Contact Information: List the one person who the City may contact concerning your proposal or setting dates for meetings. 25a. Name: * 25b. Telephone No: * 25c. Fax No: 25d. Email: * 26. Headquarter Physical Location 26a. Address: * 26b. City: * 26c. State: * 26d. Zip Code: *



Step 4: Small Business Economic Development Advocacy (SBEDA) Questionnaire 5 of 6

Please answer the remaining questions

	26e. Telephone No. (Area Code): *								
	26f. Date established:: *	00.00.000	00 🛅						
	26g. Total number of part-time and full-time employees, company-wide: *								
27. SAMSA Physical Location: San Antonio Metropolitan Statistical Area (SAMSA)									
is defined as: Atascosa, Bandera, Bexar, Comal, Guadalupe, Kendall, Medina									
and Wilson counties. Vendors with multiple SAMSA offices only need to enter									
	one address.								
	27a. Is the Headquarter located in the SAMSA?:		O No	O Yes					
28. SAMSA Physical Location:									
	8a. If the vendor is not Headquartered in the SAMSA, does the vendor have any:								
	office(s) in the SAMSA? If "Yes" respond 28b through 28g. If "No" skip to 29:		O No	○ Yes					
	28b. Address: *								
	28c. City: *								
	28d. State: *]					
	e. Zip Code: *								
	28f. State the number of part-time, full-time and contract employees in the SAMSA:								
	ce(S):								
	g. Date SAMSA offices(s) established:		00.00.0000						
	29. Debarment / Suspension Information								
	29a. Has vendor or any of its principals been debarred or suspended from con	tracting:	○ No	OVec					
				700					



Step 4: Small Business Economic Development Advocacy (SBEDA) Questionnaire 6 of 6

Please answer the remaining questions

29b. Identify the public entity and the name and current phone number of a:						
representative of the public entity familiar with the debarment or:						
suspension, and state the reason for or circumstances surrounding the:						
debarment or suspension, including but not limited to the period of time:						
for such debarment or suspension.:						
30. Surety Information						
30a. Has the vendor ever had a bond or surety canceled or forfeited?:	O No	Yes				
30b. State the name of the bonding company, date, amount of bond and reason for:						
such cancellation or forfeiture.:						
31. Bankruptcy Information						
31a. Has the vendor ever been declared bankrupt or filed for protection from creditors:						
under state or federal proceedings?:	O No	Yes				
31b. State the date, court, jurisdiction, cause number, amount of liabilities:						
and amount of assets.:						
Small Business Economic Development Advocacy Program - Please visit						
WWW.sanantonio.gov/edd/SmallBusiness/#SBEDA for more information.						
32. Are you certified with the South Central Texas Regional Certification Agency?:						
Please visit www.sctrca.org for more information.:	O No	Yes				
32k. If you are HUBZone certified, please indicate certification number:						
33. Any information captured in this registry will not preclude the registrant from						
responding to COSA solicitations.						
By clicking Save you affirm that the information provided is true and completed by						
an individual authorized to do business for the vendor. Vendor is required to						
update profile within 72 hours of any changes. Vendor is required to update any						
changes to the profile and confirm interest in performing work for the City annually. Save						
To delete details, use this Button Delete						

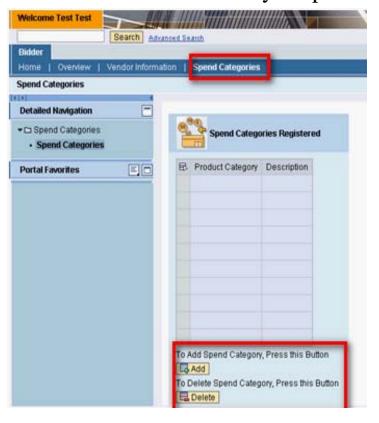


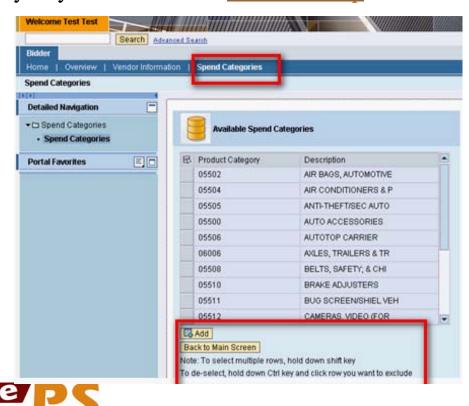
Step 4: Spend Categories

https://webapps.sanantonio.gov/NIGPCodes/

<u>Important:</u> The NIGP Commodity Codes you select will determine the solicitation notices your company will receive via e-mail. You may add or delete commodities within your profile as frequently as you desire. View <u>NIGP Lookup</u>

San Antonio eProcurement System





You have successfully completed all four steps of the vendor registration process



Responding to a Solicitation

Important

- Under the Overview tab you will have the ability to view bid solicitations based on the commodities you selected
- If a solicitation has opened prior to your registration and your commodity updates, you must contact the buyer listed on the solicitation to be added to the list
- □ No submission will be allowed after the deadline has passed or time has expired
- □ Vendor may make changes to bids prior to deadline
- Please do not submit bids via both methods electronic and paper. The City of San Antonio will accept paper bids only through September 30, 2011.



Notification of a solicitation via-email

RFx 6100000306

■ BUYERS BUYERS Add to contacts To scotsherman@hotmail.com

```
Mr. Will Smith,
We would like to draw your attention to the following RFx:
ZD BUYER1 03/07/2011 11:11 6100000306
```

Closing date for applications: Submission deadline: 03/22/2011 00:00:00 Opening time: 03/25/2011 00:00:00

Please log into your supplier account on our website to find complete information about this RFx.

We would be pleased to receive an RFx response from you.

Best regards,

The City of San Antonio

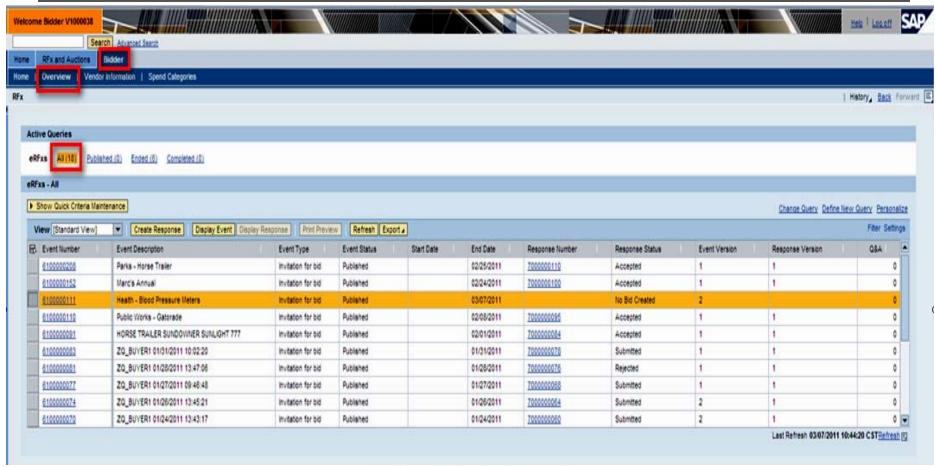


SAePS Portal Logon



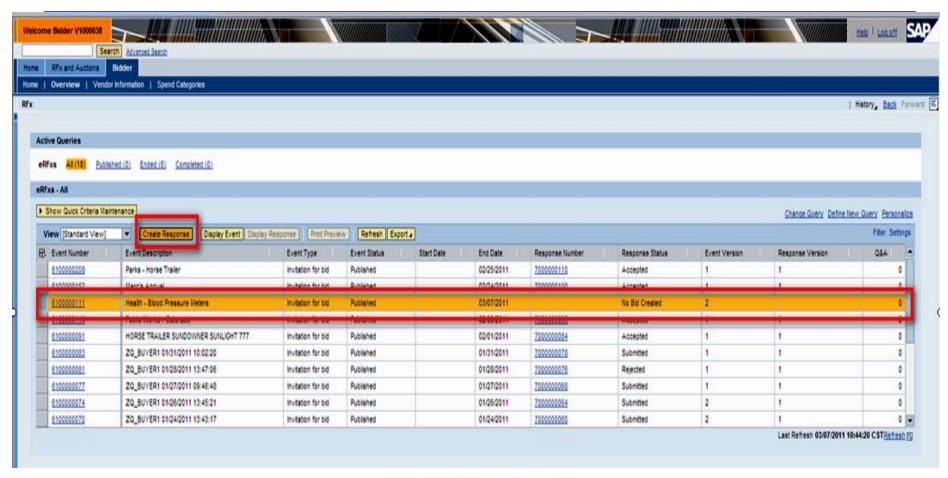


Bidder tab



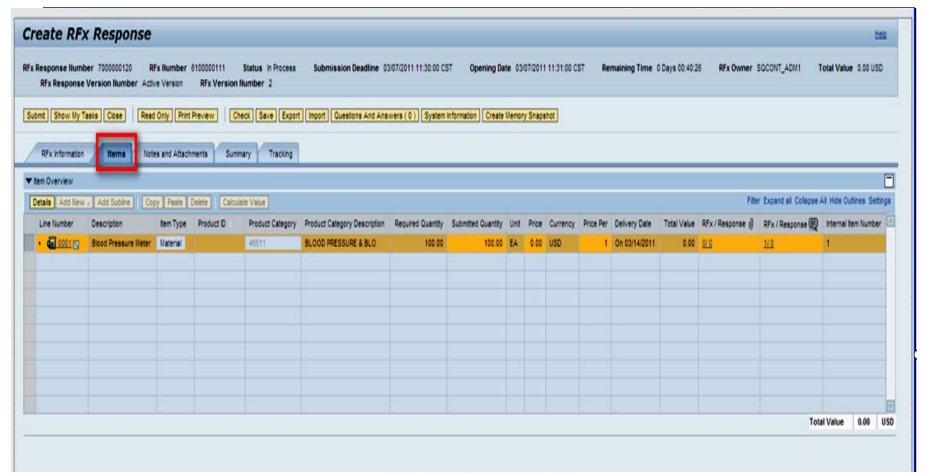


Create Response



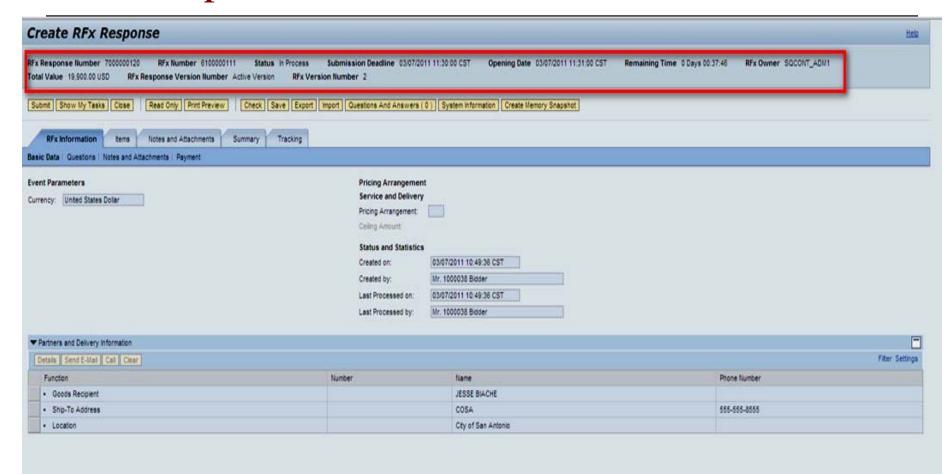


Create Response



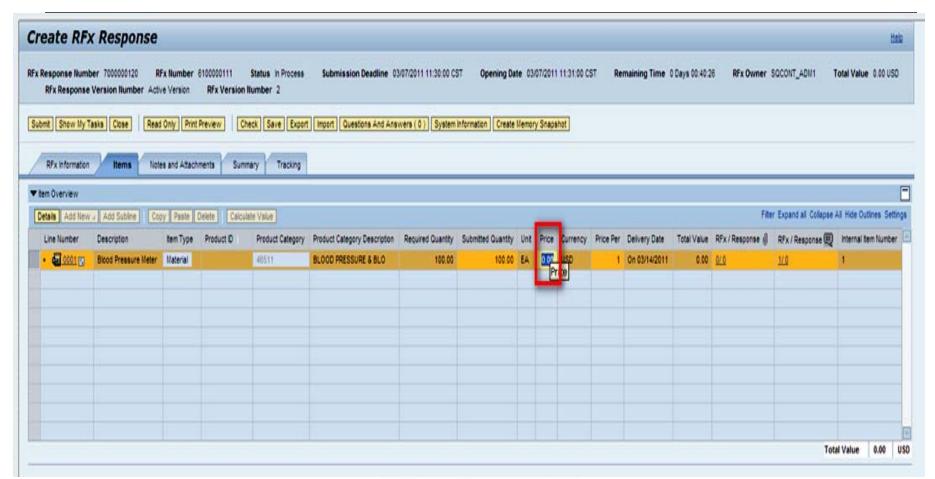


RFx Response Overview



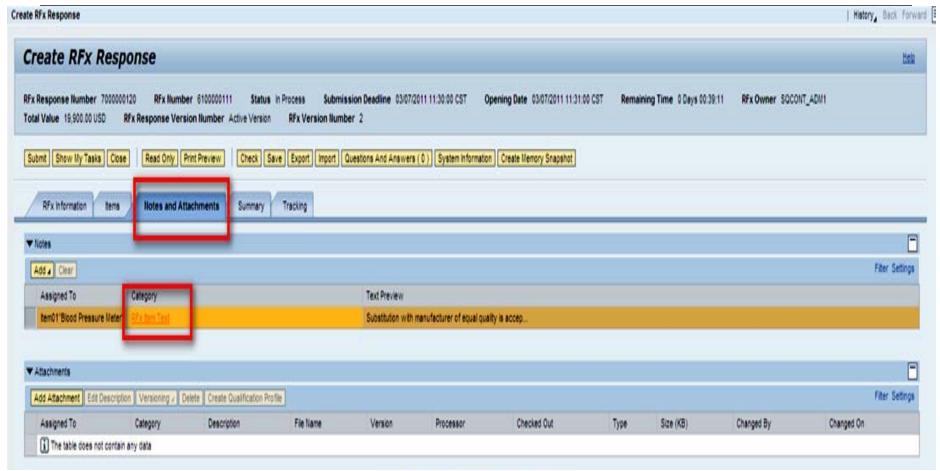


Enter Price



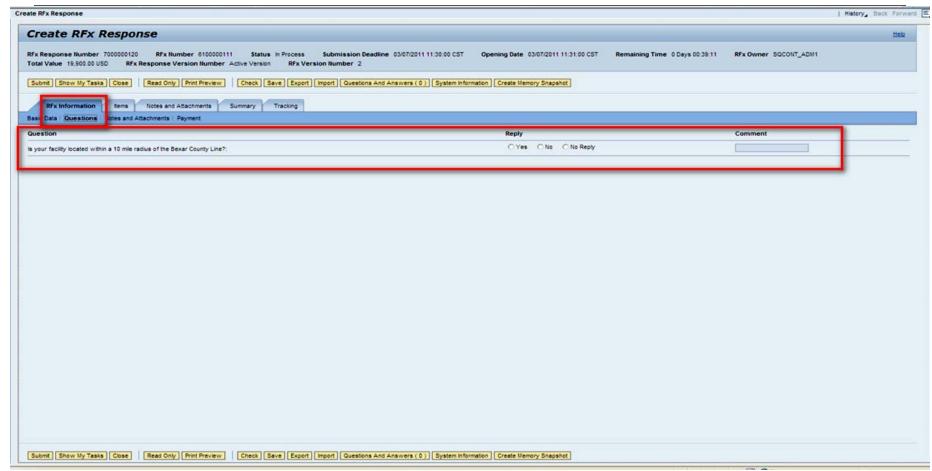


Review Notes and Attachments for additional information



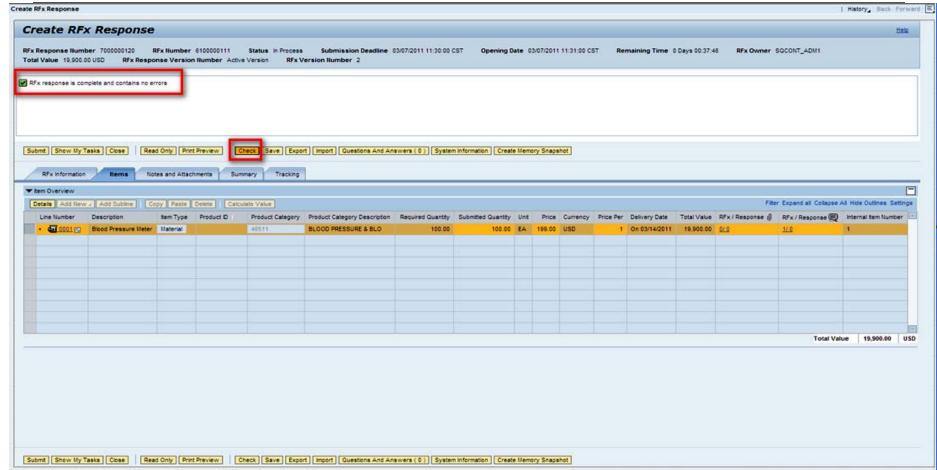


Respond to RFx Question(s)



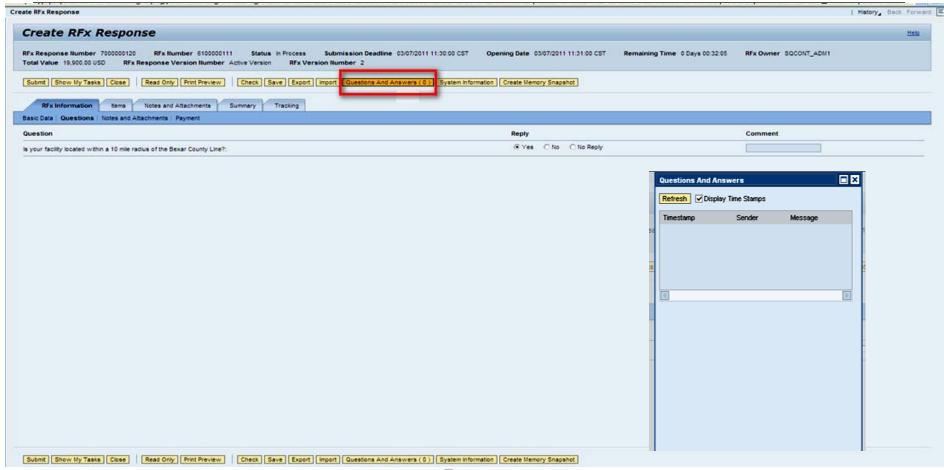


"Check" for response errors



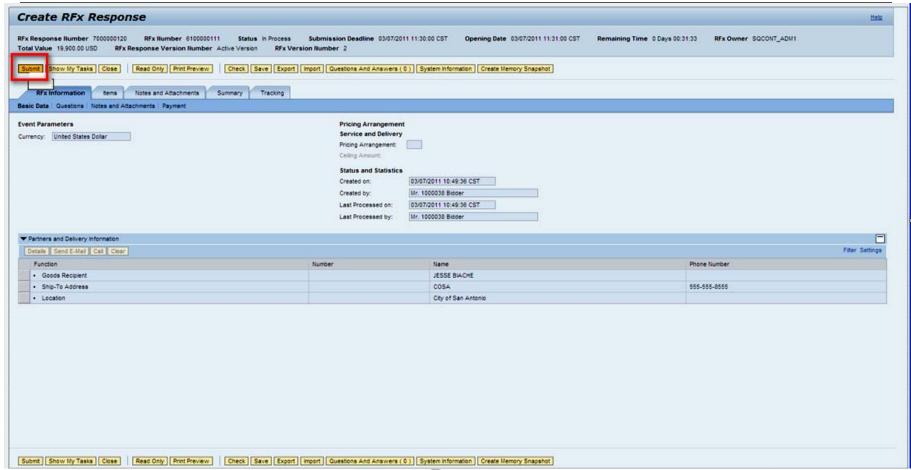


Submit Question(s) regarding RFx



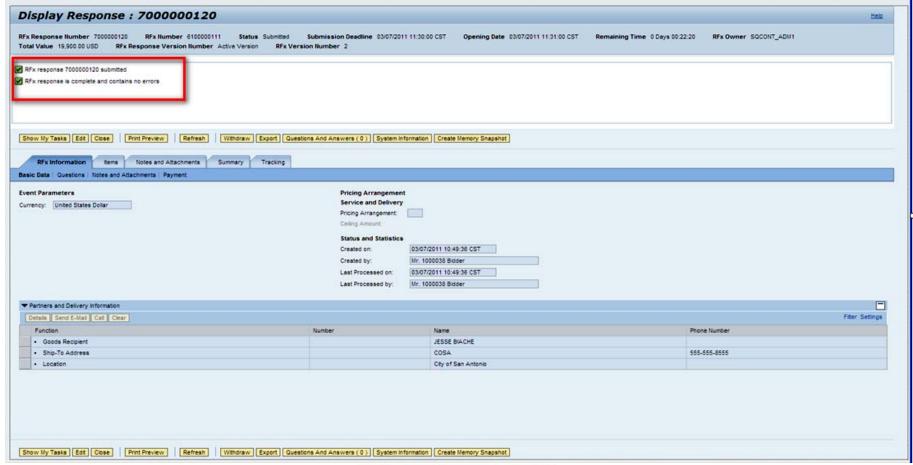


Submit RFx Response



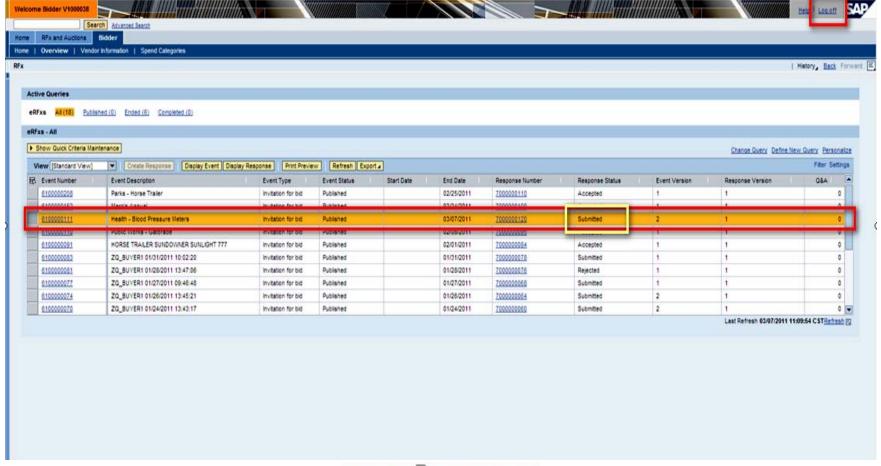


Display Message of RFx Submission





Response Status Updated





Thank You

